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L A T E N E W S

An Argentine Government appeal for a reduction in meat consumption, in order to make possible larger shipments to foreign markets, was issued on February 15. The Government requested the Argentine people to observe 1 meatless day a week. The appeal was not accompanied by an official decree or any plan for mobilizing compliance. It is not expected, therefore, that a significant reduction in consumption will take place.

The Soviet Government ordered substantial price reductions on a number of products in commercial stores effective February 26. Price reductions apply to rye and wheat bread, bakery products, flour, macaroni, sugar, confectionery products, tea and coffee, cheese, meat and meat products, fish and fish products, cigarettes, vodka, and wines.

Signature of an Italian-Danish commercial agreement was expected in Rome on March 2. Under the agreement Italy would export certain food products, especially lemons, and machinery to Denmark up to a total value of 12 million Danish Crowns, or 564 million Italian lire. Denmark in return would send Italy fresh and prepared fish, specially cod fish, and machinery, largely dairy equipment. The transportation situation prevents shipment of livestock from Denmark to Italy.

Admixture of 20 percent of oat flour with standard flour for bread has been decided upon by the Italian authorities in view of world grain shortages, it was reported.

Portuguese bread rations were reduced on March 1. The daily ration of white bread in urban centers was cut from 189 to 154 grams per capita, or by 18.5 percent. Adulterated dark bread rations for the same centers were reduced from 292 to 250 grams, or by 14 percent. Dark bread rations in rural districts were reduced from 500 to 458 grams, or by 8.4 percent. Corn bread rations in urban centers were reduced from 350 to 294 grams and in rural districts from 500 to 470 grams. Allocations of wheat flour for the manufacture of alimentary pastes were cut by 20 percent and those for cakes and crackers by 50 percent. In addition, all bread flour after March 1 must contain a certain percentage of corn flour.

The Hong Kong Government reduced the rice ration by 50 percent effective February 18. Ration per registered consumer was fixed at 2.7 pounds of rice and 2 pounds of flour every 5 days.

A large number of pigs was reported as dying from hog cholera in the Department of Santa Rosa, Guatemala. The Guatemalan Department of Agriculture has placed the infected area under quarantine and is taking steps to control the outbreak.

WORLD WHEAT PRODUCTION IN 1945 DECLINES SHARPLY

The 1945 world wheat production is now estimated at about 5,200 million bushels, about 8 percent less than the 1944 crop and approximately 12 percent smaller than the 1935-1939 average. At that figure the outturn would be the smallest since 1929. Harvests were much below average for all areas except North America and Asia, where total production was considerably above average though still not as large as in 1944. The greatest reduction is indicated for Europe, with total 1945 production estimated at about 1,035 million bushels, or 36 percent smaller than the prewar average.

As a result of the small wheat crop, together with shortages of other grains and rice, world import requirements of wheat in 1945-46 considerably exceed the available supply. The increase in the requirements has come mainly from Europe and North Africa. Larger shipments are needed for regular importing countries, and import requirements have arisen for some European and North African countries that are normally on an export basis. Hungary, for example, an important surplus area both before and during the war, had a crop this year reported at less than 25 percent of average. Other Danube countries reported their wheat crops at 35 to 65 percent of average. India is also looking for wheat imports because of unfavorable prospects for the wheat crop to be harvested there in April-May, and a reported shortage of rice this year.

Surplus stocks in Argentina and Australia are below normal at present. The 1945-46 production was smaller than average in both countries, and carry-over stocks at the beginning of the current season were considerably below the level of recent years, particularly in Australia where stocks were virtually wiped out at the beginning of this crop year. Surpluses in these countries for the current season are not expected to exceed 150 million bushels. The bulk of the prospective exports of 850-900 million bushels during 1945-46 would thus be from Canada and the United States.

In view of the unfavorable supply position, bread continues to be rationed in most countries with prospects for reduced rations in many countries during the remainder of the current season. Milling extraction rates are being increased in some deficit countries to stretch available supplies. At the same time, the United States has announced an increase to 80 percent in its extraction rate, in order to make more wheat available for deficit countries.

Acreage and Yield Smaller: The large decline in world production resulted from reductions in both acreage and yields per acre. World wheat acreage was estimated to be about 8 percent smaller than average, compared with the 12-percent decline in production. Near-record acreage and record yield in the United States were in decided contrast with the situation in other areas. A drop of about 23 percent in the European acreage, compared with the 1944 acreage, was attributed largely to unfavorable seeding

WHEAT: Acreage, yield per acre and production in specified countries, year of harvest, average 1915-1919, annual 1943-1945 $\frac{a}{b}$

Continent and country	Acreage b/			Yield per acre		Production		
	Average 1915-1919 ACRES	1943 1,000 ACRES	1944 1,000 ACRES	1945 prelim. ACRES	Average 1915-1919 Bushels	1943 1,000 bushels	1944 1,000 bushels	1945 prelim. 1,000 bushels
North America:								
United States	57,293	50,043	59,095	64,740	11.2	841,023	1,072,177	1,123,143
Canada	29,595	15,850	21,204	21,404	12.2	264,460	445,645	405,912
Mexico	1,204	1,253	1,303	1,277	11.2	13,385	13,757	13,652
Estimated total	88,150	68,220	81,700	87,500	-	1,119,000	1,525,000	1,542,000
Europe:								
United Kingdom	1,843	1,444	3,220	2,279	13.8	126,688	117,152	79,333
Ireland	1,225	709	842	862	11.2	17,659	20,388	21,000
Spain	10,280	8,167	8,856	8,856	11.1	113,905	106,336	106,000
Portugal	1,127	1,169	1,159	1,159	11.1	15,066	10,848	10,472
Switzerland	168	248	243	243	13.0	6,050	8,962	9,083
Greece	2,170	1,803	11,831	11,840	13.0	30,205	286,494	15,800
Italy	12,675	11,803	11,831	11,070	22.1	273,283	286,582	194,542
Germany	5,074	4,401	531	-	24.8	118,634	149,913	-
Austria	9,616	539	531	-	24.8	15,117	11,014	-
Czechoslovakia	2,220	-	-	-	26.6	59,038	13,000	-
Poland	12,850	-	-	-	18.0	77,245	-	-
France	12,402	10,378	489	(9,130)	22.8	286,340	242,506	184,000
Belgium	47	40	40	414	42.2	16,130	18,569	14,500
Luxembourg	137	121	208	31	25.2	11,234	1,082	700
Denmark	138	168	208	215	45.4	11,358	6,253	10,286
Netherlands	138	168	208	215	45.0	15,209	11,868	7,953
Norway	740	(117)	(115)	118	29.9	2,331	(2,500)	2,888
Sweden	254	288	882	731	39.2	26,351	19,341	23,255
Finland $\frac{a}{b}$	512	313	313	312	26.2	7,013	5,843	6,211
Lithuania	746	-	-	-	17.0	9,584	-	-
Latvia	168	-	-	-	12.0	9,584	-	-
Estonia	168	-	-	-	12.0	9,584	-	-
Bulgaria $\frac{a}{b}$	1,020	3,331	3,337	3,102	10.4	84,032	57,974	43,818
Rumania	1,091	-	3,803	-	20.2	84,032	81,830	-
Hungary	9,053	-	-	-	15.5	91,216	-	-
Yugoslavia	5,349	-	-	-	18.1	36,750	-	-
Albania	10	-	-	-	15.2	1,507	-	-
Estimated total $\frac{a}{b}$	78,152	75,400	71,300	61,800	-	1,626,000	1,475,000	1,035,000
Soviet Union	98,764	-	-	-	-	-	-	-
Africa:								
Algeria	4,124	3,449	3,436	3,170	8.4	35,201	26,455	11,023
French Morocco	1,254	1,516	2,834	2,286	7.1	21,198	17,821	5,767
Tunisia	1,915	1,557	1,714	1,710	11.3	47,460	34,611	14,445
Union of South Africa	1,926	2,707	2,405	2,405	8.2	16,855	7,423	6,152
Estimated total	13,800	14,300	13,400	12,800	-	114,000	106,000	85,000

[illegible]

Compiled from official sources and International Institute of Agriculture, where available; otherwise Office of Foreign Agricultural Relations estimates (shown in parentheses) based on foreign service reports and other information.

g) Years shown refer to year of harvest. Harvests of the Northern Hemisphere countries are combined with those of the Southern Hemisphere which immediately follow; thus, the crop harvested in the Northern Hemisphere in 1945 is combined with the Southern Hemisphere harvest which began late in 1945 and ended early in 1946.

b/ Figures refer to harvested areas as far as possible.

b) Figures refer to harvested area
c) Average of 1988 to 1995

2/ Official estimates adjusted to include Aleaces Lorraine.

2/ Official estimates adjusted to include Alaska and Hawaii.

e/ Estimates for 1947 to date take account of boundary changes and are, therefore, not strictly comparable with earlier years shown.

c/ Estimated European totale make allowance for apparent underestimation in many countries for recent years especially for 1945. *d/* Estimates from 1943 to date include Southern Borneo, Java and are, therefore, not strictly comparable with earlier years shown.

weather over wide areas during the fall seeding period, the lack of draft power, organization difficulties, land reform, and to war operations in some countries.

Lowest relative yields were reported for some European and North African countries. A severe spring drought over most of the Mediterranean area, especially in North Africa, Spain, Italy and parts of the Balkans reduced yields. The low level of fertilizer available for the crop was also an important factor, which was reflected in smaller yields in most European countries. Sharp reductions in the production of eastern and central Europe were also attributed to land reform, population shifts, hurriedly carried out, and to the extensive requisitioning of draft power and equipment.

Changes in 1945 production since the time of the last publication have together accounted for a drop of 150 million bushels in the world total. The downward revision in the December estimate for the United States amounted to 26 million bushels, and the estimate for Canada was reduced 3 million. Changes in European estimates resulted in a net decrease of about 65 million bushels from the previous estimates for that total. Later information on the outturns in central Europe and the Balkans account for a large part of the reduction. Official estimates for individual countries, in some instances, appear to be too low, and Office estimates have been substituted or an allowance has been made in the estimated European total to compensate for such undervaluation.

Estimates for European countries that have had changes in boundaries have been, so far as possible, adjusted to 1937 boundaries to make them comparable with earlier years. If production were shown on the basis of present frontiers, a part of the output shown in the European total would be included in the estimate for the Soviet Union. Prewar wheat production in the annexed territory of Bessarabia, Bukovina, Ruthenia, eastern Poland, the Baltic States, and part of Finland is estimated to have been about 80 million bushels.

Production within prewar boundaries of the Soviet Union in 1945 was believed to be the highest in that country since 1942, but still considerably below average. The gain in output was indicated to be on the basis of increased acreage, with little change from yields per acre of the preceding year. No significant alteration has been made in estimates for Africa or Asia, since last published. The South American total, on the other hand, has been reduced about 50 million bushels as a result of a smaller outturn than had been expected in Argentina. That crop is now estimated at about 150 million bushels from earlier prospects. Unusually heavy abandonment (placed at 4.2 million acres) and slightly reduced yields largely accounted for the drop in the production estimate. The Australian crop, now placed at 140 million bushels, is a little larger than the previous estimate.

This is one of a series of regularly scheduled reports on world agricultural prospects approved by the OFAR Committee on Foreign Crop and Livestock Statistics. For this report the Committee was composed of Joseph A. Becker, chairman, C. M. Purves, Gordon P. Boals, Judith E. Downey, Lois B. Bacon, J. A. Hopkins, and Robert J. Manovill.

WORLD HOG NUMBERS IN 1945 AND 1946

At the start of 1946, world hog numbers declined about 5 million head from an estimated total of 249 million a year earlier, preliminary estimates reveal. This decrease is attributed largely to a sharp drop in central European hog numbers and to fewer hogs in 1946 than a year earlier in Canada and Argentina. The reductions in these areas were only partially offset by moderate increases in the United States, France, and the Soviet Union, together with small increases in other countries.

The 1945 world hog estimate of 249 million head is 16 percent smaller than the record level of 1940 and 13 percent less than the 10-year (1931-1940) average. As would be expected, the decline occurred because of war in Europe and Asia with the total for the two continents, including the Soviet Union, at the beginning of 1945 of only 127 million head, compared to the 10-year (1931-1940) average of 185 million head. On the other hand, hog numbers in the Western Hemisphere plus Oceania totaled 118 million head in 1945, compared to the 10-year (1931-1940) average of 97 million head.

Reflecting the critical world shortage of grains, world hog numbers outside the United States are expected to decline further during 1946, in spite of a total meat supply well below the demand. The trend in hog numbers over the next year, however, will depend upon the ability of governments to direct the utilization of grain into human consumption rather than to hog raising. In countries otherwise in a position to expand hog raising, the inability to obtain feed grains curtailed the tendency toward expansion in the past year, and this same situation will continue into 1946.

Hog numbers for Canada for the beginning of 1946 (December 1945) are 1.8 million head below a year earlier. This is about the same absolute decline as shown for the beginning of 1945 in relation to 1944, with present numbers about 38 percent below 2 years ago. Hog numbers in the United States on January 1, 1946, are only about 26 percent below January 1, 1944, by reason of a 4-percent increase the past year. In Mexico and Cuba, unfavorable weather conditions in 1944 and 1945 reduced the maize crop, and hog numbers are not believed to have increased, notwithstanding a strong demand for lard and pork.

In Argentina, the poor corn crop of 1944-45 and relatively unfavorable price relationships a year ago caused considerable liquidation in breeding stock in 1945, and the number of hogs in mid-1946 will probably be from 30 to 40 percent below numbers a year earlier. With an improvement in the corn crop over a year ago, and relatively high prices being offered for lard, some increase in breeding in 1946 is not unlikely. Elsewhere in South America changes in hog numbers are believed to be only moderate, with statistical information too incomplete to reflect the minor changes occurring. Some increase in hog raising in Brazil may result from the good corn crop in the 1945-46 season.

HOOS: Numbers in specified countries,
averages 1931-1935 and 1936-1940, annual 1941-1946

Continent and country	Month of estimate a/	Average		1941	1942	1943	1944	1945 b/	1946 b/
		Thousands	Thousands						
North America									
United States	Jan. 1	54,790	48,342	54,256	60,777	73,746	83,852	59,799	62,744
Canada	Dec. 1	3,906	4,078	6,117	6,527	7,751	9,473	7,647	5,853
Mexico	June	3,698	c/	-	-	-	e/	-	-
Guatemala	July	102	213	276	290	-	240	-	-
Honduras, Republic	July	370	235	-	235	-	258	-	-
El Salvador	July	355	559	481	518	417	-	-	-
Nicaragua	July	400	c/	-	-	-	-	-	-
Cuba	Dec. 31	794	c/	857	-	853	-	765	-
Estimated total		66,200	61,300	-	-	-	103,200	76,700	77,500
Europe									
United Kingdom	June	3,739	4,380	2,558	2,143	1,829	1,867	2,152	-
Ireland (Ireland)	June	1,064	978	764	519	474	381	429	-
Norway	June 20	400	793	(280)	(230)	130	(225)	(200)	-
Sweden	Summer	1,492	1,292	1,001	845	989	1,054	(1,085)	-
Denmark	Jan.	4,716	2,997	1,968	1,691	1,605	2,291	1,819	a/
Netherlands	May	2,079	1,493	948	491	545	560	769	-
Belgium	Dec. 31	1,268	1,005	633	444	526	485	635	-
Luxembourg	Dec. 1	156	143	-	-	90	100	(60)	-
France	Dec. 1	6,606	7,044	5,425	5,164	4,819	4,204	4,080	-
Spain	Dec. 31	5,097	4,944	5,613	5,000	-	4,973	(5,000)	-
Portugal	Dec. 31	1,206	1,206	1,253	(1,225)	-	(1,200)	(1,100)	-
Switzerland	April	971	915	763	670	629	600	698	-
Italy	March	3,262	3,095	3,645	3,725	(3,300)	(3,000)	(2,600)	-
Germany	Dec. 1	23,434	24,274	21,578	18,303	15,025	16,549	15,803	(10,000)
Austria	Dec. 1	2,823	c/	(2,500)	(2,000)	(1,850)	(1,875)	(1,600)	977
Czechoslovakia	Dec. 31	2,887	3,200	(3,100)	(2,850)	(2,800)	(3,050)	(2,900)	(2,100)
Poland	June 30	6,546	c/	(6,000)	(5,500)	(5,000)	(4,900)	(3,000)	-
Hungary	Spring	2,531	c/	-	-	-	(3,500)	(1,200)	a/
Yugoslavia	Dec. 31	2,874	3,238	-	-	-	(1,800)	(1,850)	(2,200)
Greece	Dec. 31	464	c/	-	-	-	(1,175)	(273)	(300)
Bulgaria	Dec. 31	902	833	873	1,112	1,077	498	67	a/
Rumania	Dec. 31	3,092	3,052	-	-	-	(2,600)	(1,400)	(800)
Lithuania	Dec. 31	1,250	1,221	-	-	1,050	1,000	1/	-
Latvia	June	674	823	-	-	700	750	1/	-
Estonia	June	295	370	310	220	250	215	1/	-
Finland	Sept.	460	485	259	237	260	364	229	-
Estimated total		79,900	81,200	-	-	-	53,300	51,500	46,000

Soviet Union	Winter	17,200	23,900	-	-	-	-	(12,400)	(17,600)	(15,000)
Asia	Dec. ^a / _a	-	2,777	-	-	-	-	-	-	-
India	Dec. ^a / _a	490	538	-	-	-	-	-	-	-
Burma										
China and Dependencies	^a / _c	76,000	62,000	-	-	-	-	-	-	-
Japan	Dec. ^a / _a	902	1,100	^a / _e	1,718	-	-	-	-	-
Korea	Dec. ^a / _a	1,242	1,605	-	-	-	-	-	-	-
Formosa	Dec. ^a / _a	1,777	1,803	^a / _e	1,205	-	-	-	-	-
British Malaya		1,447	746	-	-	-	-	-	-	-
Philippines Islands	Dec. ^a / _a	2,697	3,713	-	-	-	-	-	-	-
Netherlands Indies	Dec. ^a / _a	1,260	1,111	-	-	-	-	-	-	-
Estimated total		91,800	80,900	-	-	-	-	64,500	62,100	-
Africa										
Morocco ^a / _a	Dec. ^a / _a	94	64	69	128	175	146	146	146	50
Algeria	Mar. 1	70	58	104	191	190	135	135	-	-
Tunisia	Dec. ^a / _a	22	24	15	20	29	25	25	23	23
Union of South Africa	August	908	1,007	-	-	1,174	(1,200)	(1,200)	(1,000)	-
Madagascar ^a / _a	Dec. ^a / _a	478	578	531	539	561	534	534	449	-
Estimated total		3,000	3,300	-	-	-	3,700	3,700	3,400	-
South America										
Colombia	Dec. ^a / _a	1,589	1,572	1,600	-	-	-	-	-	2,500
Ecuador	^a / _c	200	275	819	-	846	-	-	-	-
Peru	^a / _c	800	800	450	-	-	-	-	-	-
Chile	^a / _d	331	420	361	401	-	452	452	-	-
Brazil	^a / _c	22,640	23,224	-	25,000	-	-	-	-	-
Uruguay	^a / _d	308	373	450	350	-	-	-	-	-
Argentina	^a / _d	3,769	3,574	4,980	5,707	(6,800)	(8,800)	(8,800)	8,010	(5,000)
Estimated total		30,600	31,200	-	-	-	39,400	39,400	38,900	-
Oceania										
Australia	Dec. ^a / _a	1,121	1,242	1,797	1,477	1,563	1,747	1,747	1,640	-
New Zealand	Jan. ^a / _a	601	753	769	689	612	581	581	602	-
Estimated total		1,800	2,100	-	-	-	2,400	2,400	2,200	2,200
Estimated world total		285,500	283,900	-	-	-	283,900	283,900	248,500	-

Office of Foreign Agricultural Relations. Annual data are from official sources, except figures in parentheses, which are office estimates, and relate to prewar boundaries. Data for some averages are obtained from publications of the International Institute of Agriculture. Totals include estimates for countries for which official statistics are unavailable.

a/ End of year estimates (October to December) included under following year for comparisons and totals. Thus for Canada the December 1940 estimate of 6,117,000 is shown under 1941. b/ Preliminary. c/ Less than 5-year average. d/ Census 1940. e/ Unofficial estimate. f/ Official statistics; may be an underestimate of actual numbers. g/ Census, December 1941. h/ Censuses for June 40, 1941 and July 20, 1942; not comparable with March estimates for other years. i/ March. j/ Includes Southern Dobrudja. k/ Excludes Southern Dobrudja. l/ Included in estimated European total. m/ Census, 1940. n/ Free and occupied China, including Turkestan, Manchuria, and Inner Mongolia. o/ Number taxed. p/ 1944. q/ September.

Hog numbers in the United Kingdom in June 1945 showed a 15 percent rise over the same date in 1944, but were still only about half of 1936-1940 levels. The gain over the previous year is attributed to a slight improvement in feed supplies. Pig raisers were allowed slightly higher quantities of feed beginning in the spring of 1945, but this has more recently been cut back to earlier levels.

For England and Wales, the September 4 census of hogs on farms confirmed earlier forecasts that the increased scale of feed ration for hogs was not resulting in an increased breeding program. Total breeding sows in England and Wales in September 1945 were about 11 percent less than a year earlier. With gilts forming a relatively small proportion of the numbers, there may be no increase in breeding in the near future, and possibly a further decline.

Somewhat the same situation as in the United Kingdom prevails in Denmark and Switzerland. Feed supplies in the past year have become too uncertain to allow an immediate expansion in hog numbers.

Available information indicates some improvement in hog numbers for Belgium and the Netherlands in 1945 and 1946 over the small wartime levels. In Belgium present hog numbers are believed to be approaching the 1936-1940 average, but in the Netherlands numbers are only about 60 percent of the 1936-1940 level.

Hog numbers in France for the fall of 1945 have been reported at about 40 percent above the previous year, equal to about 80 percent of prewar. While larger numbers have been in prospect in that country, the extent of the increase cannot be substantiated until the release of official figures, which is expected soon.

Hog numbers in central Europe were reasonably well maintained during the war until near the end of 1944. Immediately thereafter, owing to the closing phases of the war, numbers dropped off rapidly and are now only about two-thirds of wartime levels. In the Balkan countries hog numbers for the beginning of 1945 show a sharp drop from a year earlier. Some increase, however, was indicated during 1945 in Yugoslavia, Greece, Bulgaria, and Rumania.

At the start of 1945 hog numbers for all continental Europe are now placed at 49 million head, compared to 56 million head in 1944 and the 5-year (1936-1940) average of 76 million head. Preliminary estimates indicate 43 million head for the beginning of 1946.

In the areas of the Soviet Union overrun by the Germans, some restoration of hog numbers has occurred from the very low point reached at the beginning of 1944. Increases of about 10 percent each year are believed to have occurred in 1944 and 1945, in spite of feed shortages and the small number of breeding animals on many war-torn farms.

The number of hogs acquired in conquered areas of eastern Europe and moved to the Soviet Union are believed to be small in relation to cows that could be driven long distances. Lack of adequate transportation has also handicapped the restocking of hogs in devastated areas of Soviet Union from unoccupied parts. Hog numbers at the beginning of 1946 are unofficially estimated at 15 million head, compared to the record number for January 1, 1938, of 25.7 million head.

The raising of hogs expanded rapidly in North Africa following 1941 due to relatively abundant feed supplies of grain and garbage, together with the demand for meat. This development began to subside in 1944, and the poor crops of 1945, owing to drought, have caused hog numbers to drop back to about prewar levels. The poor maize crops the past 2 years in the Union of South Africa have caused a decided drop in hog numbers in that country.

In 1945 hog numbers in Australia declined from the near record level of the previous year. Feed shortages resulting from drought conditions and labor difficulties were responsible for the reduction. Although feed supplies have improved from a year ago and the United Kingdom has contracted to take all exportable supplies of pigmeats until September 30, 1947, hog numbers at present are below a year ago because of the reduced number of sows for farrowing in the 1945-46 season.

Hog numbers declined in New Zealand after 1941 because of a decrease in dairy output and reduced quantities of skim milk and whey available for hog feeding. Although the supply of these byproducts improved in the 1944-45 season, pig raising did not increase much because of labor shortages and less efficient handling of the pigs and feed. Only a slight improvement is expected in 1946, when hog numbers are expected to be about 83 percent of the 1936-1940 average.

China is the only important producer of hogs in Asia. Numbers began to drop after 1937 when the Japanese began war with China. By 1945 numbers were reduced to less than three-fourths of prefighting numbers, but some slight improvement is believed to have occurred since the beginning of 1945.

This is one of a series of regularly scheduled reports on world agricultural prospects approved by the Office of Foreign Agricultural Relations Committee on Foreign Crops and Livestock Statistics. For this report the committee was composed of Joseph A. Becker, chairman, C.M. Purves, Floyd E. Davis, Hazel Kefauver, D. D. Jones, R. J. Manovill, and F. S. Straus.

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COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS, AND FEEDSECUADORAN RICE
OUTLOOK BRIGHT

In Ecuador prospects are excellent for a record rice crop this year, a report from Guayaquil discloses. Although it is too early to give an accurate estimate, barring an early dry season in April, production should exceed the previous record of 7.6 million bushels (225 million pounds milled) in 1943. About 80 percent of the total output is harvested from May to July and 20 percent from October to December.

Rice exports during 1945 were the lowest in 5 years, equaling 65 million pounds, compared with the record of 142 million the preceding year. Reduced stocks at the beginning of the year and planting of a smaller acreage caused the sharp decline in exports.

ECUADOR: Rice exports by country,
average 1939-1941; annual 1942-1945

Country	: Average : : 1939-1941 :	1942	: 1943	: 1944	: 1945 a/
	: Million : : pounds	: Million : : pounds	: Million : : pounds	: Million : : pounds	: Million : : pounds
Cuba	3	28	81	88	56
Peru	9	8	20	29	0
Venezuela	10	20	0	17	4
Colombia	6	0	b/	0	b/
Panama	3	23	b/	2	b/
Others	5	6	4	6	5
Total	36	85	105	142	65

Compiled from official sources, except for 1945.

a/ Preliminary. b/ Less than 500,000 pounds.

FATS AND OILSCUBAN FATS AND OILS
SHORTAGE CONTINUES

As a result of a sea-train strike, which delayed imports considerably, Cuba's tight supply situation in fats and oils continued during January. Domestic peanut-oil production and soybean-oil imports, however, are expected to be large enough to offset in part the reduced lard and other edible-oil imports. About 75 percent of normal Cuban fats and oils requirements are dependent upon imported stocks.

January arrivals of edible oils included 6 million pounds of lard, compared with nearly 9 million pounds in the same month last year; 60,000 pounds of crude soybean oil and 385,000 pounds of refined soybean oil; and about 34,000 pounds of refined olive oil, which had almost vanished from Cuban imports during the war.

Production of peanut oil, the only important vegetable oil produced in Cuba, amounted to about 2 million pounds of oil in January. Processing of the winter peanut crop, which will probably be completed in February, is expected to yield 10 million pounds of oil for the season. Planting of the spring peanut crop will begin in March. Domestic lard production possibly did not exceed a half million pounds, or only around 10 percent of domestic requirements for this commodity during January. For the same month Cuban butter production was almost 200,000 pounds.

In view of the strong domestic demand, inedible and edible tallow production, which amounted to around 1 million pounds in January, is expected to increase this year. In 1945 output was about 10 million pounds, or twice the 5-year (1938-1942) average. While no tallow was imported during January, 35,000 pounds of animal greases were received, most of which is believed to have gone to the leather industry rather than into soap manufacture. Owing to the lack of soap fats in January many Cuban soap factories were forced to shut down. A shipment of about 7 million pounds of soap, principally laundry type, was received from Argentina during January.

January linseed-oil imports of nearly 560,000 pounds, largely from the United States, were reported to be sufficient for only 2 months consumption requirements.

COTTON AND OTHER FIBERS

EIRE'S FLAX CROP CONTINUES TO RISE

The 1945 flax area in Eire was 32,800 acres, according to final estimates of the Eireann Department of Agriculture. Preliminary expectations are for about 11 million pounds of scutched flax line fiber from the crop. This compares with 30,300 acres planted in 1944, which yielded a total of about 10.5 million pounds of fiber and 4.7 million pounds of tow, and 27,600 acres in 1943, with a crop of 9.5 million pounds of fiber and 3.1 million pounds of tow.

The entire output of retted flax continues to be exported to Great Britain. During the first 11 months of 1945 the 9.2 million pounds, which were shipped out, almost equaled exports for the same period of 1944.

The price offered this year by the British Ministry of Supply is 20 to 25 shillings per stone (28.8 to 36.0 cents per pound) for dam-retted,

hand-scutched flax, according to grade, with the corresponding grades of turbine-scutched flax at 1 shilling 6 pence (about 30 cents) above the price for hand-scutched fiber. The new price is 5 shillings per stone (7.2 cents per pound) less for each grade than was paid for the 1945 crop. English flax seed for planting was offered to growers at the same price as in the past year.

Yields per acre were reported as variable but generally satisfactory. The northern counties averaged from 24 to 30 stones (336 to 420 pounds) per acre, County Cork averaged 30 to 35 (420 to 490 pounds), and County Mayo had the largest yield, averaging 32 to 42 stones (448 to 588 pounds) per acre.

Before the war only about 9 percent of the total consumption of the Northern Ireland linen mills was home-grown flax. Availability of flax from the European Continent will, no doubt, influence future cultivation in Eire, although mills of Northern Ireland are now dependent on domestic supplies for the greater part of their consumption. The guarantee of prices for the 1946 crop is expected to be sufficient to encourage farmers to maintain flax acreage at a substantial part of the present area.

WEEKLY COTTON PRICES ON FOREIGN MARKETS

COTTON: Price of certain foreign growths
and qualities in specified markets

Market location, kind, and quality	Date: 1946:	Unit of weight	Unit of currency	Price in: foreign currency	Equivalent U. S. cents per pound
Alexandria (spot)	:	Kantar	:	:	:
Ashmouni, F.G.F.	:2-28:	99.05 lbs.	:Tallari:	31.75:	26.51
Ashmouni, Good.....	:2-28:	99.05 lbs.	:Tallair:	33.50:	27.97
Karnak, Good.....	:2-28:	99.05 lbs.	:Tallari:	38.50:	32.14
Bombay (March futures)	:	Candy	:	:	:
Jarila.....	:3-1:	784 lbs.	:Rupee:	470.75:	18.09
Bombay (spot)	:	Candy	:	:	:
Kampala, East African....	:3-1:	784 lbs.	:Rupee:	850.00:	32.66
Buenos Aires (spot)	:	Metric ton	:	:	:
Type B.....	:3-2:	2204.6 lbs.	:Peso:	1380.00:	18.64
Lima (spot)	:	Sp. quintal:	:	:	:
Tanguis, Type 5.....	:3-2:	101.4 lbs.	:Sol:	110.00:	16.69
Recife (spot)	:	Arroba	:	:	:
Mata, Type 5.....	:3-1:	33.07 lbs.	:Cruzeiro	80.00:	13.17
Sertao, Type 5.....	:3-1:	33.07 lbs.	:Cruzeiro	82.00:	13.50
Sao Paulo (spot)	:	Arroba	:	:	:
Sao Paulo, Type 5.....	:3-1:	33.07 lbs.	:Cruzeiro	107.50:	17.70
Torreón (spot)	:	Sp. quintal:	:	:	:
Middling, 15/16".....	:3-2:	101.4 lbs.	:Peso:	96.25:	19.53
	:	:	:	:	:

Compiled from weekly cables from representatives abroad.

TOBACCOARGENTINE TOBACCO
PLANTINGS LARGER

The area planted to tobacco in Argentina for the 1945-46 season is now placed at 66,149 acres, according to the second estimate of the Ministry of Agriculture. This represents a reduction of 1.7 percent from the first estimate, but is 24 percent larger than the 53,534 acres planted in 1944-45. The average area planted to tobacco during the crop years 1939-40 through 1943-44 was 47,800 acres.

YUGOSLAV TOBACCO
ACREAGE TO RISE

Yugoslav Government officials have recommended 1946 tobacco plantings of 49,064 acres, or about 27 percent larger than the average area of 38,600 acres during the 5 years 1935-1939. In prewar years, Yugoslavia's tobacco production was sufficient to provide an export surplus of about 10 million pounds annually, principally destined to Czechoslovakia and Poland. With average yields, the projected 1946 plantings should provide a considerable quantity for shipment abroad.

U. S. TOBACCO EXPORTS
UP SHARPLY IN 1945 1/

United States exports of unmanufactured tobacco in 1945 totaled about 473 million pounds (declared weight), with a valuation of 239 million dollars, preliminary figures indicate. The 1945 exports were the largest since 1938, when 489 million pounds were shipped abroad, and exceeded the 5-year (1935-1939) average of 421 million pounds. Of the total 1945 exports, nearly 80 percent, or 377 million pounds consisted of flue-cured. Fire-cured types, amounting to about 65 million pounds, made up 14 percent of the total, and exports of Burley totaled 11 million pounds or slightly larger than the 1935-1939 average.

In 1945, flue-cured exports were destined to some 50 countries and dependencies. The United Kingdom took 289 million pounds, or 77 percent of the exports of this class, and retained its position as this country's principal customer for leaf tobacco. Other important buyers in 1945 were Australia, India, Eire, New Zealand, Egypt, and Switzerland.

The bulk of fire-cured exports in 1945 was destined to France which took 41 million pounds, or 63 percent of the total. Average exports of fire-cured tobacco during the 5 years (1935-1939) to France totaled only 19 million pounds. Other principal importing countries in 1945 were Switzerland, Belgium, and the United Kingdom.

United States exports of Burley tobacco in 1945 totaled 11 million pounds and were distributed among 33 countries. Most of the total quantity was exported during the last 6 months of the year. Portugal, the Netherlands, Belgium, and France were the principal importers.

UNITED STATES: Exports of unmanufactured tobacco, declared weights,
average 1935-1939, annual 1941-1945

	: Average:	:	:	:	:	:
	: 1935- : 1941	: 1942	: 1943	: 1944	: 1945	
	: 1939	:	:	:	:	
	: 1,000 : 1,000	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000
	: <u>pounds</u> : <u>pounds</u>	: <u>pounds</u>	: <u>pounds</u>	: <u>pounds</u>	: <u>pounds</u>	: <u>pounds</u>
Flue-cured	312,889:	232,851:	212,109:	368,548:	251,351:	377,356
Kentucky and	:	:	:	:	:	:
Tennessee Fire-	:	:	:	:	:	:
cured	48,959:	9,834:	8,071:	10,315:	7,982:	58,773
Virginia fire-cured	9,049:	4,288:	6,426:	3,956:	3,976:	6,644
Burley	10,635:	6,017:	5,166:	4,133:	8,119:	11,618
Maryland	5,390:	2,490:	913:	1,325:	1,697:	2,898
One Sucker	956:	1,234:	154:	456:	991:	3,314
Green River	3,019:	516:	459:	531:	550:	1,564
Black fat, etc. ...	8,867:	3,530:	3,046:	3,160:	1,969:	3,235
Cigar	1,269:	1,945:	289:	675:	2,210:	5,208
Perique	132:	26:	828:	64:	105:	115
Stems, trimmings	:	:	:	:	:	:
and scrap	19,632:	7,026:	70:	207:	1,238:	1,914
Total	420,797:	269,757:	237,531:	393,371:	280,188:	472,639
Value, 1,000	:	:	:	:	:	:
dollars	127,798:	65,299:	67,806:	170,250:	146,440:	239,077
	:	:	:	:	:	:

Source: Foreign Commerce and Navigation of the United States, and records of the Bureau of the Census.

1/ Mimeographed tables are available upon request to the Office of Foreign Agricultural Relations. The several classes are tabulated separately, and show all countries of destination, average 1935-1939, and annual 1941-1945.

FRUITS, VEGETABLES, AND NUTS

ARGENTINA ENLARGES GARLIC EXPORT QUOTA

Argentina's Secretariat of Industry and Commerce has increased the exportable quota for garlic from the previously established quota of 55,000 bags to 132,000 of 100 pounds. The period of enforcement is to be extended to August 31, 1946.

This measure has been adopted in view of the fact that new crop yields are higher than estimated when the earlier quota was established. Export permits will be issued by the Bureau of Exports and Imports at the request of interested parties under the same conditions which have prevailed to date.

ARGENTINE ONION
OUTPUT INCREASED

Argentine onion production for 1945-46 is estimated at 3,056,000 bags of 100 pounds, 62 percent more than the 1,888,000 produced in 1944-45. In San Juan Province, which produces about half of the total output, the crop is estimated at 1,784,000 bags, nearly twice as much as the 919,000 bags in 1944-45.

LIVESTOCK AND ANIMAL PRODUCTSAUSTRALIAN WOOL
EXPORTS INCREASE

Wool exports from Australia have increased materially in the first 5 months (July-November) of the current season over a year ago. They reached 271 million pounds, actual weight (grease and scoured wool, including tops and noils). This is an increase of 50 percent above the same period of 1944-45. Exports to the United States reached 107 million pounds and were 56 percent larger than a year earlier. The bulk of the remainder, 20 million pounds, going to non-European countries was to Canada, Mexico, Turkey, and India. Exports to the United Kingdom reached 135 million pounds and were 32 percent more than last year for the same period. For the first time since 1939-40, some Australian wool was shipped direct to a continental European port, as Belgium was listed as taking about 7 million pounds.

In the five prewar seasons, 1934-35 to 1938-39, the United Kingdom took 39 percent and continental Europe 41 percent of the annual average of 827 million pounds of grease and scoured wool exported from Australia, Japan took 16 percent, while the United States took 27 million pounds, or only 3 percent of the total. During the war virtually the total quantity exported from Australia went to the United States and the United Kingdom. Exports to the United States in the seasons 1941-42 through 1943-44 included the quantities for the British-owned stockpile maintained in this country as well as that imported for the United States Government-owned stockpile, in addition to imports for commercial purposes.

Despite an estimated 9-percent reduction in Australian wool production to 905 million pounds for the current season (1945-46) that country has large available supplies. Australia's wartime wool accumulation, now held jointly by the Australian and British Governments, was estimated at 1,605 million pounds at the beginning of the season on July 1, 1945. Normal stocks as of July 1 in the prewar seasons, 1934-1938, averaged around 96 million pounds annually. Movement of the current clip to appraisal centers has been delayed by labor trouble this season as was the case in the preceding season.

AUSTRALIA: Wool exports first 5 months (July 1-November 30)
of 1945-46 season, with comparisons

Country	1944-45			1945-46		
	Grease:Scoured: Total			Grease:Scoured: Total		
	Million:Million:Million			Million:Million:Million		
	pounds: pounds: pounds			pounds: pounds: pounds		
United States	60.6	7.9	68.5	93.0	14.2	107.2
Canada	1.2	2.8	4.0	1.6	4.1	5.7
Mexico	0.1	0.7	0.8	1.9	3.5	5.4
Brazil	-	-	-	0.3	-	0.3
India	1.4	1.6	1.6	0.5	1.9	2.4
Egypt	0.2	0.5	0.7	-	0.9	0.9
Turkey	0.8	-	0.8	5.0	-	5.0
Total non-European ..	64.3	13.5	76.5	102.3	24.6	126.9
United Kingdom	86.6	16.3	102.9	123.6	11.8	135.4
Belgium	-	-	-	6.6	-	6.6
Other British	-	0.1	1.5	-	0.4	0.4
Other foreign countries	-	0.3	0.3	-	1.8	1.8
Total all countries..	150.9	30.2	181.1	232.5	38.6	271.1

Compiled from official sources. Converted from bales at average weight of exports in 1944-45 as supplied by the Central Wool Committee and at average weights for the current season as supplied by foreign trade report supplied by Consul from Sydney.

Australian consumption increased materially during the war but at that can take care of only a small proportion of domestic production. The peak wartime purchases by Australian mills reached 147 million pounds grease basis in 1942-43, according to information supplied by the Central Wool Committee of Australia. Since then, it has been smaller. In 1944-45, consumption fell to 125 million pounds, which was 13 percent under that of 1943-44, but still about 28 percent above average prewar consumption.

AUSTRALIA: Wool exports to principal destinations, seasons beginning
July 1, average 1934-1938, annual 1939-40 to 1944-45

Season beginning July 1	United	United	Con-		All	Total
	States	Kingdom	tinental:	Japan	other	
			Europe		countries:	
	Million	Million	Million	Million	Million	Million
	pounds	pounds	pounds	pounds	pounds	pounds
Average -						
1934-1938	27	321	341	132	6	827
1939-40	17	592	188	51	14	862
1940-41	279	184	a/	58	16	537
1941-42	558	223	-	11	24	816
1942-43	348	184	-	-	25	557
1943-44	262	221	-	-	26	509
1944-45	260	281	-	-	37	578

Compiled from official sources.

a/ If any, included with all other countries.